

Bidding successfully

A report from the seminars held at the UK
HECA conference 2008

by

Impetus Consulting Ltd

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INTRODUCTION

Impetus Consulting Ltd were asked to deliver two seminars on 'bidding successfully' at the annual HECA conference. This report is a summary of the issues and potential solutions raised at the two seminars. A copy of the presentation delivered during the seminars can be found at the end of this report.

ISSUES AND SOLUTIONS

Finding funding

One area of concern raised by attendees at the seminar was where up to date information on the funding available could be found. Another issue, linked to this, was that often by the time officers hear about the funding the deadline is upon them. In particular, funding information filters through regional groups and the local authority representatives who attend meetings don't realise who in their authority needs the information or who the fund would be relevant to.

The solutions proposed to these issues during the seminar include:

- Using the Energy Saving Trust funding database:
www.energysavingtrust.org.uk/housingbuildings/funding/database/;
- Attending HECA Fora and discussing funding options;
- Internal networking – making sure everyone knows who you are and what you do; and
- Attending relevant training sessions, for example training on European funding.

Time

Issues around time included:

- Not having enough time to write bids;
- Pulling information and resources from different departments together on time; and
- Meeting deadlines when partners are involved.

The key solution to these issues is to consider the bidding process as an ongoing project in itself. Compiling resources and keeping these up to date may seem time consuming, but it will ensure that you are ready to begin the minute funding or a project comes up. It will also ensure that you are not duplicating your efforts every time you put a bid in.

With regards to obtaining information and resources from partners, both internal and external, this is where good project management skills come to the front. Build in plenty of time to the bidding plan for getting the information you require.

Bid costing and writing

The particular issue that cropped up here was how to cost specific technical aspects of bids, for example how much an installer might charge. Suggestions on how to overcome this included:

- Obtaining information from colleagues and peers who have done this before;
- Obtaining quotes from a number of installers;
- Asking the fund manager if available and appropriate; and
- Including figures in the bid, but ensure that there's the opportunity to be flexible (to a degree) with the budget when carrying out the project.

With regards to writing bids, attendees highlighted that they sometimes struggled with checking the bids. It was suggested during the discussions that other HECA officers from the local forum could perhaps be called upon to help in this if they have had previous experience working on similar projects or bids. The other area of writing that was an area of concern was making the bid interesting. To solve this, those writing them need to involve the right people for example including someone from the internal communications department.

Partnerships

Three issues were highlighted with regards to partnerships, one of which was engaging with partners, both internal and external. The key to engaging partners (especially internal partners) is to know the project inside and out and to be enthusiastic about it. But the real trick is to be able to demonstrate to

those you wish to involve, how it can benefit them and help them meet their targets and deliver against their work plan.

With internal partnerships, the issue of not knowing who to approach was raised i.e. should you approach the person who would be involved, or should you approach their line manager? One suggestion from attendees who had been successful in this was to approach the person who would be involved, get their buy-in to the project and then both approach their manager.

Another key issue is with people saying they'll commit to the project, then not actually being able to commit enough time to it when the project actually gets started. One way to tackle this is to push partners to be realistic and honest with you. Also, rather than saying "can you be involved in this project?" how about asking "how much time can you commit to this and what can you accomplish in that time?"

An issue raised by someone who worked for a smaller local authority was that if a consortium of local authorities had put a bid in for a pot of money, the smaller authorities could sometimes get elbowed out of receiving a fair share of the funding when the project got started. A possible solution that was suggested was to either build it into the bid, or create a partnership agreement laying out the ground rules before you embark on the process.

As highlighted in the presentation, partnership working is important for nearly every aspect of the bidding process. Having a good relationship with all partners and stakeholders, both internal and external, will help ensure a smooth process for everything from the bid writing, to project development, to procurement and also sign-off of the project.

Procurement

Procurement policies were highlighted as sometimes being a barrier to writing bids. One specific example given was where computer equipment was needed for a two to three year project. The issue was that the council's procurement policy for electronic equipment was on a lease scheme where contracts were on a year by year basis and they couldn't commit to equipment for more than one year at a time. In this particular case the officer used some of the funding to purchase the equipment despite the fact that it contradicted the council's policy, as he felt he was able to prove due diligence. This is also another situation where building and maintaining good relationships with staff in the procurement team would come in useful.

A suggested solution, given in the presentation, to not having enough time to write the bid was that consultancies who could benefit financially from being involved in the project (through being contractors) would be happy to commit some time to assist with the bid writing. In the workshop it was highlighted that sometimes the council's procurement policy prevented this happening, as for contracts over a certain amount they would have to go out to tender and therefore couldn't promise the work to one contractor. However it is worth checking with the council's procurement team, as the limits of what needs to go to tender may be different at different authorities. There may also be exceptions to the rule where it is possible to contract out work without tendering for it.

Another issue raised was that sometimes a project idea was suggested, but it was not possible to develop it further because all the local authority's funding had been allocated for that year. This ties in with the suggestion in the presentation that the bidding process should be ongoing and should include the development of resources and ideas on a continual basis. So if a project idea does come up, add it to a 'wish list' of projects and develop it as much as possible over time, so that the next time budgets are set it can be built into the work plan.

RECOMMENDATIONS

The sections above make several suggestions and recommendations, which it is not necessary to repeat. However, there was one particular suggestion that UK HECA may wish to investigate further. Attendees in one of the sessions suggested that perhaps UK HECA could provide some more in depth training on bid writing to its members, perhaps including a fund manager to deliver part of the training.

Impetus Consulting Ltd

info@impetusconsult.co.uk
www.impetusconsult.co.uk

London Office:

12 Abbeville Mews
88 Clapham Park Road
London
SW4 7BX

T: 020 7819 2430
F: 020 7498 2603

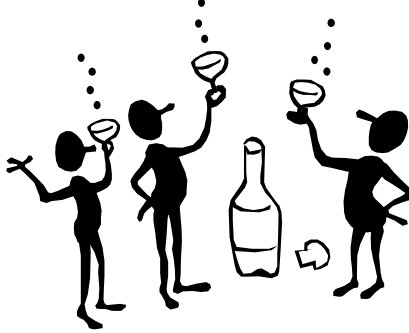
South Coast Office:

Suite 4, 39 Aldwick Road
Bognor Regis
West Sussex
PO22 0AY

T: 01243 869834
F: 01243 868947



Bidding Successfully



By Rachael Knowland



Overview



- Who we are
- Before you start: what should be in place
- Finding funding for your project
- Finding a project for the fund
- Who should be involved
- The bidding process
- Top tips

Impetus Consulting Ltd

We are an environmental consultancy with offices in London and West Sussex. Our vision is to help create the environment for change to a sustainable society and we recognise that local authorities have a key role to play in achieving this.

- We have lots of experience working with local authorities – for example we run a national advisory service for local authorities and we also work with individual local authorities on various projects;
- We spend a lot of our time writing (successful) funding bids for our own work; and
- Our directors have significant experience of evaluating bids:
 - Chair the eaga partnership charitable trust (which provides funding);
 - Sat on the EST innovation programme advisory panel; and
 - Evaluated bids to the HECAction and Innovation funding programmes.

During this seminar session, I will give you some information on how to put together a successful bid, covering the areas listed above. But I want this to be interactive and helpful to you, so I will then get you to do a bit of thinking, talking and sharing of information.

Some of the information I give here today, may seem obvious and may seem simple, but it really is the key to bidding successfully.



Before you start: what should be in place?



- Funding sources
- In-house expertise
- Partners / consultants
- Projects
- Procurement processes



Bidding for funding should be an ongoing process of coming up with ideas, putting systems in place and developing partnerships.

To successfully bid for funding, it is a good idea to have some basic tools, resources and understanding in place, so that if a project or funding opportunity comes up, you can move swiftly and don't have to duplicate your efforts.

Funding sources

• It's always a good idea to keep an up to date list of funding sources. You can always use the Energy Saving Trust's funding database, but you may want to tailor your own to include potential local sources of funding.

• You should also be aware of different types of funding (not just grants) that may be available. For example credit unions which offer interest-free loans, or private finance initiatives. The Energy Saving Trust has a briefing note that provides more information about this.

A list of your in-house expertise

• What can you do well without any help?? What skills and expertise do you have in the local authority? For example, if you are applying for funding for some community engagement work, do you have the facilitation skills required, or would you need to use an external consultant? Don't forget to look at other departments in the local authority who may have the necessary skills that you can draw upon. Where you do have skills and include them in bids, don't forget to provide evidence that you can do it!

Partners and consultants

• Who do you like to work with and what are their areas of expertise (both in terms of skills and subject areas)?

• It is worth building up relationships with those in relevant areas so that when the opportunity to bid comes up, you are not starting from scratch.

• Some funding schemes will have specific criteria about who can access the funding, in which case you are likely to have to work in partnership to access the funding. For example, a lot of funds only provide money to charities, so as a local authority you would have to work in partnership with a charity to be eligible for funding.

Projects

• Have a set of projects that you would like funding for that you can pull off the shelf when a new fund is announced. You will need to be flexible with the projects and may have to adapt them slightly to match the criteria of a new funding source.

Procurement processes

• You will need a good understanding of your procurement processes, in particular their limitations. There's no point spending time researching a project or a funding opportunity, if it's not going to get passed through your procurement process. This is most important for when a potential fund crops up with a tight deadline for which you will need to move quickly.

• It's also a good idea to build up a good working relationship with the authority's procurement team and the legal team to ensure a smooth bidding process.



Finding funding



- Define the project
- Look for the money
- Choose carefully



If you know what you want to do, but you don't have the money or the people to do it, you need to find funding for the project.

Define the project

• Firstly you need to define the project before you start looking for funding. It is important to do this well and set out a clear definition, otherwise you will waste time looking at pots of money that aren't right for you.

Look for the money

- Look at the pots of money to see which ones would fund all or part of your project.
- Remember you are likely to have to apply to several pots to get the whole thing covered. You will need to double check that the funds you selected are compatible i.e. you can use them for match funding.
- You can always submit an enquiry to the Energy Saving Trust's Practical help team to see if they're aware of any funding that you might be able to get.

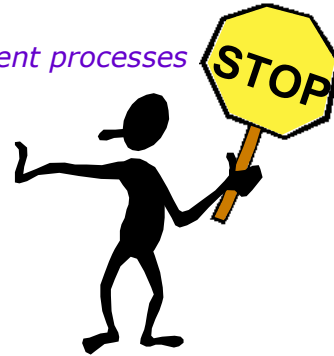
Choose carefully

- Choose the funds whose aims most closely align with what you are trying to achieve. There's no point submitting a bid to a project where it doesn't meet the funding criteria. You simply won't be successful.
- Even if it's an absolutely fantastic and worthwhile project and the people evaluating the bids agree with you, if it doesn't match the criteria they will not be able to give you the money.

Finding a project



- Unless there is time to:
 - *Define it*
 - *Build partnerships*
 - *Get match funding*
 - *Get it through procurement processes*



Finding a project for a fund. You're maintaining your list of funds and come across one that sounds really interesting – but you don't have a project defined yet...

STOP!

Ask yourself the following questions:

- Is there time for you to define it before the application deadline?
- Is there time to build any partnerships that you may need?
- Are the partners that you'd need available?
- Is there time to look for and get match funding?
- Is there time to get it through your procurement processes?

Unless the answer to all of those questions (and be realistic) is yes, then do not apply – you will not be successful.



Who should be involved?



- You
- Bid project manager
- Stakeholders
- Internal partners
- External partners
- Fund manager



Developing a bid should be treated as a mini project in itself. You cannot look at it as an inconvenience that you have to go through before you can get on with the work.

OK, so you've got a project, and found a fund (or more than one) for which the project meets the criteria. What next?

There are a number of people that need to be involved:

You / bid project manager

• Obviously you (i.e. the person whose idea / project it is) do! If you are not going to be the bid project manager, you need one of those too. A bid project manager should have the following attributes:

- Good at project management so that they can deliver to tight deadlines;
- Enthusiastic about the project; and
- Have the authority to hand out tasks and ensure they are completed.

Stakeholders

• Consult with those who might be affected by the project. Initially this may just be a quick phone call or chat to see if it's worthwhile, but some stakeholders will need to be involved in the bid. This is so that the project that you end up doing is successful and worthwhile.

Internal partners

- Whose expertise do you need (refer back to your list of in-house expertise)?
- Who is good at coming up with 'bright ideas'? They don't have to know much about the project, but they need to be creative and be able to input fresh ideas. You might not like all their ideas and they might not be included in the final project, but they can sometimes come up with a whole new angle.
- Who needs to be involved in terms of the practicalities (e.g. a member of the procurement team, or a member of the senior management team who will have to ultimately sign-off the project)? Having these people involved early on will ensure that you meet their requirements, as well as obtain their buy-in to the project.

External partners

• If there is a part of the project that you won't be able to deliver well, either through lack of resources, or through lack of expertise, then bring on board someone who can. If there is potential for fee earning for them, they will be happy to help you write the bid. Again, having these people involved early on will ensure that you obtain their buy-in to the project and make it realistic for them.

Fund manager

• Some funds offer the services of a fund manager who can review an early draft of the bid and give you advice, or are available to answer any questions you may have. Take advantage of this wherever possible. An example of this is the Energie Helpline UK who support UK organisations applying for specific EU funds such as Intelligent Energy Europe.



The bidding process



- **Build your team**
 - *People who understand and agree*
 - *Someone who can write well*
 - *A good project manager*
- **Find the money**
- **Assess chances**
- **Check deadlines and plan the project**



- **Build your team around your idea. You need:**
 - People who understand and agree with what you are trying to do;
 - Someone who can write well – the bid evaluation team will like your bid more if it is easy and enjoyable to read; and
 - Someone who is a good project manager – they will be able to develop a sensible and realistic budget and project plan.
- **Find the pot(s) to which you want to apply.**
- **Assess the chances of success and decide how much effort to expend. You will need to think about:**
 - How well your project matches the criteria for the funding projects;
 - Whether or not there are areas where it doesn't match the criteria, and whether they are areas that you can change and adapt;
 - Whether or not you have enough resources to deliver the project;
 - Whether or not you have enough time to put together the bid;
 - Whether or not you have enough time to get partners on board;
 - Whether or not your partners have the capacity to work on this (do not assume this is the case); and
 - Whether or not the fund offers information about the percentage of bids that get funded. This links in to how well your project matches the criteria. For example if only one in 20 projects get funded it may seem like long odds, but if your project really matches the criteria then it could well be worth going for.
- **This might seem like a lot of work, but having things in place (existing partnerships, procurement processes etc.) will make this much quicker. You can also pull in as many others to work on it as is sensible – both internal and external partners, and be creative. Working with neighbouring authorities is often a good idea.**
- **Look carefully at the deadlines and plan the bidding project accordingly.**
 - Be realistic and if working in partnership, allow plenty of time for liaising with partners and obtaining information from them.
 - Set internal deadlines ahead of the funding deadline in order to pull everything together.
 - Allow more time than you think you'll need for pulling together all the relevant documents, checking, formatting, proofing and polishing your bid.



The bidding process



- Get partners on board
- Brainstorm ideas
- Read bidding guidelines
- Clarify uncertainties
- Outline ideas
- Draft and cost your bid



- Get your partners on board.
- Brainstorm ideas to refine the project.
- Read the bidding guidelines carefully and check that you follow them to the letter.
- Clarify any uncertainties with the fund manager. If you're not sure – ask. Do it as soon as you have any questions, so that they have the maximum amount of time to get back to you.
- Outline your ideas and send them to the fund manager for comment if appropriate. Remember to take their comments into account!
- Draft and cost your bid. (See top tips on the later slides).



The bidding process



- Check against the fund guidelines
- Revise as appropriate
- Proof read it
- Check the budget looks sensible
- Check the numbers in the budget
- Submit **BEFORE** the deadline



- Get someone else (who has not been involved in the bid writing) to check the bid against the fund guidelines – are you ticking all the boxes?
- Revise the bid as appropriate.
- Get someone to proof read it.
- Get someone to check that the budget looks sensible.
- Get someone else to check that the numbers in the budget actually add up.
- Submit it – and try not to get too close to the deadline!

Top tips



- Don't

- *Submit it if it doesn't meet the criteria*
- *Promise more that you can deliver*
- *Think too big or too small*
- *Be discouraged by rejection*



Don't submit a bid unless your project meets the funding criteria.

Don't promise more than you can deliver: you want to build a track record.

Equally don't limit the scope of your project too much.

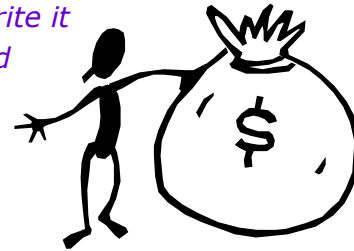
Don't be discouraged by rejection: it happens to everyone.

Top tips



- Do

- Use partners
- Use the right people to write it
- Make it interesting to read
- Be realistic
- Stick to the point
- Follow instructions
- Answer questions fully
- Approach potential funders
- Listen to and act on feedback



- Do use partners to help you.
- Do use the right people to write the bid.
- Do make the proposal interesting to read.
- Do be realistic about what you can deliver both in terms of resources and in terms of time.
- Do stick to the point: don't supply lots of information that isn't asked for, and don't exceed word limits.
- Do answer the questions fully ('I believe this bid fully meets your criteria' is NOT an answer to the question 'explain how your project meets the aims of the fund').
- Do approach potential funders (do you have a local 'star' business that might want to be seen to support you?): if you don't ask, you don't get.
- Do listen to the feedback on unsuccessful bids and act on it.



Thank you



Impetus Consulting Ltd
Unit 12 Abbeville Mews
88 Clapham Park Road
London
SW4 7BX

W: www.impetusconsult.co.uk

E: rachael.knowland@impetusconsult.co.uk

T: 020 7819 2430